



Council of the European Union  
General Secretariat

# THINK TANK REVIEW

Council Library

MARCH 2020

ISSUE 76



This Think Tank Review\* covers articles and reports published in February relating to different political and policy topics. ([twitter link](#))

The challenges facing the Croatian presidency; being more proactive in shaping our future and the global order, ahead of the Future of Europe conference; resisting deglobalisation in the case of Europe, as multilateralism is in retreat just when collective action is needed to tackle interconnected global challenges feature under the **EU politics and institutions**.

Articles discuss the challenges facing the **Common Agricultural Policy** in connection with the green deal and environmental issues, and the role of trade policy in promoting sustainable agriculture.

Regarding **competitiveness**, publications look at how the EU can foster climate-neutral, energy intensive industries, and at how things stand in the digital arena as problems/solutions hinge on the question of who controls and can access data.

In **Ecofin** affairs, the monetary union and its possible failures are discussed against the great recession in the GIIPS countries; the current narrative that the work to create the banking union is almost complete is questioned; the EU's instruments to tackle aggressive tax planning and harmful tax practices are shown to be coherent and relevant, and potential improvements to the EU's tax strategy are outlined; and the issue of fair taxation of digital companies is raised.

On **employment and health affairs**, articles comment on a European minimum wage, which seems to be in the offing, and on how placing health and well-being at the centre of EU policies is key for social fairness, equality and inclusion.

Think tanks consider the **European Green Deal** to be a new main goal of the EU for convincing younger people of the crucial role of Europe in tackling challenges of the 21st century. Articles assess the Just Transition Fund and how it can fulfil its objective of mitigating the social and economic costs of the shift to a climate-neutral economy. The impact of the European Green Deal on the EU's external action is also considered.

On **justice and home affairs**, papers assess the implementation of the European arrest warrant; explore the weaknesses in the application of the Dublin regulation.

On **foreign affairs**, reports highlight HR Josep Borrell's statement that the EU needs to learn the 'language of power'; member state preferences on the extension of qualified majority voting in EU foreign policy; the strategic competition between the US and China to foster the deglobalisation trend further; the Coronavirus and freedom of expression in China, and Russia's reliance on European investment.

The TTR can be downloaded from Council's Library [blog](#). TTR articles are available via [Eureka](#), the resource discovery service of the Council Libraries.

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## CENTAR ZA EVROPSKE POLITIKE (EUROPEAN POLICY CENTRE)

### Croatia's Presidency of the Council of the EU. Future of Europe in the hands of a Balkan country

by Strahinja Subotić [@mr\\_Subotic](#)

Croatia took over the Council Presidency from Finland at a turbulent time *inter alia* for enlargement policy. Finding itself at a critical juncture, Croatia will have the herculean task of strengthening the image of Europe as one that grows, connects, protects, and influences the global stage, against all odds. (4 p.)

## FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

### Futures(s) of Europe

by Maria João Rodrigues

In 2020 a conference on the Future of Europe is to be launched. It is high time for progressives to leave behind the inertia of the past and seize the opportunity to be more proactive in trying to shape our future and the global order that is unfolding. The study identifies the future scenarios that could develop, from climate change to digitalisation, and from the persisting tensions in the Middle East to the question of how to manage migration, Trump's provocations and the threats to multilateralism. (7 p.)

## FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

### Progress in Europe. Five years with Juncker

by Giacomo Benedetto [@ggbenedetto](#)

The Juncker Commission set very ambitious goals upon its election in 2014. This study tries to assess to what extent it was successful in achieving them, with a particular focus on its investment policy and budget matters. The assessment takes into account that the Commission was faced with unexpected crises, namely Brexit and the so-called refugee and migration crisis, which put extra pressure on it. Moreover, the assessment considers that the Commission was confronted with a lack of consensus at European level on many key policy areas, which made the achievement of an agreement even more difficult. (12 p.)

## HERTIE SCHOOL/JACQUES DELORS CENTRE

### Juncker's curse? Identity, interest, and public support for the integration of core state powers

by Björn Bremer [@bjoern\\_bremer](#), Philipp Genschel and Markus Jachtenfuchs

This study analyzes the patterns and covariates of public support for the European integration of core state powers. It shows that horizontal transfers are supported more than vertical capacity building; member states from the EU's South-East are more supportive than states from the North-West; and support increases from debt relief to unemployment assistance, sharing the burdens of refugees, and military defense to disaster aid. Identity is a strong and fairly consistent predictor for individual variations in support. Overall, support for the integration of core state powers is higher and more variable than expected. (20 p.)

## BRUEGEL

### Resisting deglobalisation: the case of Europe

by Zsolt Darvas [@ZsoltDarvas](#)

Global trade and finance data indicates that the pre-2008 pace of economic globalisation

*has stalled or even reversed. The EU has defied this trend, with trade flows and financial claims continuing to grow after the recovery from the 2008 global economic and financial crisis. Immigration, including intra-EU mobility, has also continued to increase. An analysis of public opinion in EU countries shows that support for globalisation, free trade and immigration, is on the rise. EU public opinion on these issues does not differ greatly from the rest of the world. (34 p.)*

### FRIENDS OF EUROPE

#### Rethinking global governance

by Arnaud Bodet [@bodet\\_arnaud](#) Indrė Krivaitė [@indre\\_kri](#), Zachary McGuinness et al. (eds)

*It is a dangerous paradox: multilateralism is in retreat just when collective action is most desperately needed to tackle complex and interconnected global challenges, including the climate crisis. US President's 'America first' policies, including a retreat from international initiatives such as the Paris climate agreement, have strained global governance structures. Emerging nations are demanding a stronger voice in the running of global affairs. Demands from China, India and Brazil for a stronger international rule-making role have therefore added to the drive for global governance reform. New areas demanding collective action now include hybrid threats, connectivity, information-sharing, human rights and cyber security. However, institutional reform and change are easier said than done. (64 p.)*

### INTERNATIONAL INSTITUTE FOR DEMOCRACY AND ELECTORAL ASSISTANCE

#### Populist government and democracy: an impact assessment using the global state of democracy indices

by Annika Silva-Leander [@AnnikaSilva](#) and Martin Brusiš

*Electoral successes of populist politicians and parties in the past decade have posed challenges to both established and younger democracies. How have these new political actors affected the quality of democracy? The global state of democracy indices*

*provide a unique data set to study this question. This report shows how the indices can be used to assess the impact of populism on democracy. (9 p.)*

### HEINRICH-BÖLL-STIFTUNG (HEINRICH BÖLL FOUNDATION)/V-DEM INSTITUTE

#### Populism, nationalism and illiberalism. A challenge for democracy and civil society Populismus, Nationalismus und Illiberalismus: Herausforderung für Demokratie und Zivilgesellschaft

by Anna Lührmann [@AnnaLuehrmann](#) and Sebastian Hellmeier [@shellmei](#)

*A decline in democratic quality can be observed worldwide. The terms populism, nationalism, illiberalism, and authoritarianism are omnipresent in attempts to explain and describe this development. This paper examines overlaps, differences and their relationship to one another, and highlights global and regional trends of autocratization, and also the consequences of this development for civil society in the affected countries. (EN - 34 p./ DE - 36 p.)*



### AGRICULTURE AND FISHERIES

ROBERT SCHUMAN

#### Les enjeux de la PAC pour la prochaine décennie

by Bernard Bourget

The Common Agricultural Policy is entering in a new era regarding the next decade due to the withdrawal of the UK and the several enlargements witnessed. The CAP has to take into account environmental and climatic issues also as far as the green deal is concerned. Moreover, the Commission envisions to coordinate and emphasize CAP with the competition and industry policies. The article outlines that the launch of CAP suffers from the lack of agreement between the heads of State regarding the MFF. A decrease of the budget allocated to CAP is notably expected. (6 p.)

EUROPEAN CENTER FOR  
INTERNATIONAL POLITICAL ECONOMY  
(ECIPE)

#### The role of trade policy in promoting sustainable agriculture

by Fredrik Erixon [@FredrikErixon](#) and Philipp Lamprecht [@P\\_Lamprecht](#)

This report looks closer at the interplay between the formulation of domestic standards and provisions in free trade agreements that either acknowledge domestic standards or establish standards in a direct way. The report considers especially nine modern FTAs and its purpose is to

investigate how governments with high sustainability ambitions approach the issue of trade and sustainability. It also looks directly at how these standards are designed, and what lessons can be learned for governments that want to raise sustainability ambitions. (42 p.)

ISTITUTO AFFARI INTERNAZIONALI (IAI)

#### Human trafficking in the Thai fishing industry: a call to action for EU and US importers

by Giulia Cretti [@giulia\\_cretti](#)

Thailand is one of the world's largest fishery exporters. It is the leading exporter of canned tuna and one of the world's top exporter of frozen shrimps. This multi-billion-dollar seafood industry has come under the international spotlight since 2015, when investigations revealed serious issues such as human trafficking, modern slavery and illegal unreported unregulated fishing taking place in Thai waters. Since the EU threatened to ban imports from the country in 2015, the Thai government made significant efforts to clean up the sector. (6 p.)

### COMPETITIVENESS (INTERNAL MARKET, INDUSTRY, RESEARCH AND SPACE)

ISTITUTO AFFARI INTERNAZIONALI (IAI)

#### Space and the future of Europe as a global actor: EO as a key security aspect

by Jean-Pierre Darnis [@jpdarnis](#), Xavier Pasco and Paul Wohrer [@paulwohrer](#)

Earth observation data has become a strategic asset for the EU in the monitoring of maritime, land and atmospheric environments, in climate change projections and in providing emergency management and security services. The economic benefits provided by Copernicus have been estimated to 13.5 billion euro in less than ten years. However, new technologies and data management capabilities may hinder the benefits it provides to European service companies: most Copernicus data are exploited by non-European industries, able to leverage most of the benefits thanks to a



robust data storage and analysis infrastructure. The technological solution would consist in a European Cloud infrastructure providing storage and analytical capacities to European small and medium enterprises. (27 p.)

### E3G

#### Fostering climate neutral, energy intensive industries in Europe: a policy vision for the EU industrial strategy

by Oliver Sartor and Johanna Lehne [@JohannaLehne](#)

The EU has set the ambition for Europe to become the first climate-neutral continent by 2050. This will require a step-change in emissions reductions across the European economy, including in energy-intensive industries, such as steel, cement, aluminium, paper and chemicals. (20 p.)

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)/SAMAK

#### A progressive approach to digital tech. Taking charge of Europe's digital future

by Justin Nogarede [@JNogarede](#) and Jan-Erik Støstad [@StøstadJe](#)

Digital issues are rising on the political agenda everywhere: locally, nationally, and internationally. Whether it is the power of online platforms, the impact of technologies such as AI and autonomous driving, or 'fake news'. As digital technology permeates our everyday life as citizens, workers, consumers and voters – for good and bad – we can no longer treat digitalisation as a separate, technical or inevitable matter. Instead, the task at hand for Europe is to set out its own path for the digital transition. This requires a positive vision, and collective action. (52 p.)

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

#### Digital union: what has happened so far? What should progressives aim at next?

by Paul Tang [@paultang](#) and Justin Nogarede [@JNogarede](#)

This study surveys some of the monumental events and trends of last year, and looks at some of the policy responses in the digital field at European level. It looks ahead to what will certainly be an important year for digital policymaking in Europe. Although it is always risky to make predictions, many of the problems in the digital arena, as well as the solutions, hinge on the question of data, and that this is the key policy debate for the coming year and beyond. What are data? Who controls them? Who can access them? And on what terms? How should they be used? (14 p.)

### FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

#### Competition policy and data sharing on data-driven markets: steps towards legal implementation

by Jens Prüfer

Over 90 per cent of internet searches go through Google; in social media Facebook's European market share is over 70 per cent; and almost half of Germany's online commerce now takes place via Amazon. A few companies dominate broad swathes of internet commerce. This tendency towards monopolisation not only endangers competition, but in the medium term weakens business's innovative capacity. Studies also show that market concentration goes hand in hand with inequality or income and wealth. (19 p.)

### INSTITUT MONTAIGNE

#### Space: will Europe awaken?

by Juha-Matti Liukkonen, Arthur Sauzay [@ArthurSauzay](#) and Sebastian Straube

In order to be heard on the international stage, Europe needs to have a leading role in space. Space has become a geostrategic issue and an expression of both hard and

soft power, politically and economically. The EU can be proud of its achievements (Galileo and Copernicus). However, these two programs still need to be successfully completed in the context of the upcoming 2021-2027 MFF to make sure Europe actually reaps the benefits of these investments. The report stresses the challenges which the EU must overcome (safe management of Earth orbit, economic utilization of celestial bodies, etc.). (44 p.)

### ECONOMIC AND FINANCIAL AFFAIRS

#### EUROPEAN PARLIAMENT THINK TANK

##### Macroeconomic imbalances procedure: has it worked in practice to improve the resilience of the euro area?

by Lorenzo Codogno [@lorenzocodogno](#)

*This paper assesses the contribution of the macroeconomic imbalance procedure (MIP) to its original objectives. It analyses whether the EU and the euro area are today better equipped to identify and prevent unsustainable macroeconomic developments in the future, and provides an overview of how the MIP has worked in practice. It presents some stylised trends in macro variables and how the procedure tracks them. It provides a counterfactual exercise on how the procedure would have helped to address the underlying problems in those member states that required financial assistance during the financial and economic crisis. (30 p.)*

#### SVENSKA INSTITUTET FÖR EUROPAPOLITISKA STUDIER (SWEDISH INSTITUTE FOR EUROPEAN POLICY STUDIES)

##### The ECB's power over non-euro countries in the banking union

by Dominique Ritleng

*Sweden and other non-euro countries are currently pondering membership of the European banking union, a membership that would require them to enter into a close cooperation with the ECB. This analysis aims to demonstrate how non-euro countries would be bound by legal acts adopted by the*

*ECB within the framework of the single supervisory mechanism. (20 p.)*

#### HERTIE SCHOOL/JACQUES DELORS CENTRE / BERTELSMANN STIFTUNG

##### Ring-fencing in the Eurozone and the road to the banking union

by Sima Kammourieh Petrov

*The banking union is one of the most important and ambitious projects launched by the EU in the last ten years. With supervisory and resolution mechanisms for eurozone banks now up and running, the current narrative is that most of the work to create the banking union is complete. This paper disputes this view, arguing that the persistence of financial protectionism at member state level significantly erodes the effectiveness of the eurozone's single supervisory and resolution mechanisms. It formulates concrete recommendations and calls for a political leap of faith from eurozone member states to cease ring-fencing practices. (9 p.)*

#### LUISS SCHOOL OF EUROPEAN POLITICAL ECONOMY

##### The GIIPS countries (Greece, Ireland, Italy, Portugal, Spain) in the great recession: was it a failure of the monetary union?

by Pietro Reichlin

*Drawing from the debate between the "German" and the "Keynesian" views about the reason for the euro area slow recovery after the 2008 financial shock, the study discusses different claims about why and if this is a consequence of the monetary union institutional failures, and it investigates some key factors that are considered to be good predictors of the prolonged and deep recession involving peripheral Europe. (19 p.)*



### BRUEGEL

#### From climate change to cyber-attacks: incipient financial-stability risks for the euro area

by Zsolt Darvas [@ZsoltDarvas](#), Marta Domínguez-Jiménez [@MartaDomniguezJ1](#) and Guntram Wolf

The European Central Bank's November 2019 financial stability review highlights the risks to growth in an environment of global uncertainty. It also discusses sovereign-debt concerns in case interest rates increase, and risks arising from household and corporate debt. It assesses the risks from a possible overvaluation of asset prices, and evaluates risks within the banking and non-banking system, and climate risks. (16 p.)

### CENTRE FOR EUROPEAN POLICY STUDIES

#### The impact of EU price rules: interchange fee regulation in retail payments

by Willem Pieter de Groen

This paper assesses the impact of the interchange fee regulation, introduced in 2015. It concludes that the regulation has led to a drop in interchange fees – in some cases below the maximum defined in the legislation in all EU member states. (24 p.)

### CENTRE FOR EUROPEAN POLICY STUDIES

#### Reflections on the EU objectives in addressing aggressive tax planning and harmful tax practices

by Andrea Renda [@profAndreaRenda](#), Felice Simonelli [@simonellifelice](#), Willem Pieter de Groen et al.

This report analyses the EU's instruments to tackle aggressive tax planning and harmful tax practices. It confirms the coherence, relevance, and added value of the EU's approach. It also confirms the continued relevance of most of the original needs and problems addressed by the EU's initiatives in the field of tax avoidance, and outlines potential improvements to the EU tax strategy. (146 p.)

### JACQUES DELORS INSTITUTE / BERLIN/BERTELSMANN STIFTUNG

#### Users, data, networks. A Proposal for taxing the digital economy in the European Single Market

#### Nutzer, Daten, Netzwerke. Ein Vorschlag zur Besteuerung der Digitalwirtschaft im europäischen Binnenmarkt

by Pola Schneemelcher [@pola\\_schnee](#) and Paul-Jasper Dittrich

The fair taxation of digital companies has been high on the European policy agenda since last year. One of the central problems of the issue is that the current rules on the taxation of companies in the EU are not taking due account of digital value creation. This paper analyses this problem and makes a proposal on the taxation of digital value creation in the Single Market. (15 p.)

### DEUTSCHE INSTITUT FÜR ENTWICKLUNGSPOLITIK (DIE)

#### Steuer- und Sozialpolitik: Ein unterschätzter Beitrag zur sozialen Kohäsion

by Francesco Burchi, Armin von Schiller [@a\\_vonschiller](#) and Christoph Strupat

This article argues that development measures on tax collection and social policy have a major impact on the European fiscal compact and beyond. The article identifies three mechanisms that link social policy and tax collection and with the help of which political decision-makers can strengthen the fiscal compact and thus social cohesion: increasing the effectiveness and expansion of public social policy; broadening the tax base and improve transparency. (DE - 4 p.)

### EMPLOYMENT / SOCIAL POLICY / HEALTH AND CONSUMER AFFAIRS

#### EUROPEAN TRADE UNION INSTITUTE

##### The European minimum wage on the doorstep

by Torsten Müller [@TMueller\\_Wue](#) and Thorsten Schulten [@ThorstenSchult6](#)

*In January, the Commission published a document kicking off the first phase social partner consultation 'on possible action addressing the challenges related to fair minimum wages'. In the long history of the debate about a European minimum wage policy, this initiative represents a watershed because for the first time the Commission considers taking legislative action to ensure fair minimum wages in Europe. The initiative is furthermore noteworthy because minimum wages are no longer exclusively viewed as an impediment to downward flexibility of wages and competitiveness. (7 p.)*

#### EUROPEAN TRADE UNION INSTITUTE

##### Labour in the age of AI: why regulation is needed to protect workers

by Aída Ponce Del Castillo [@APonceETUI](#)

*Superpowers, states and companies around the world are all pushing hard to win the AI race. Artificial intelligence (AI) is of strategic importance for the EU, with the Commission recently stating that 'artificial intelligence with a purpose can make Europe a world leader'. For this to happen, the EU needs to put in place the right ethical and legal framework. This brief argues that such a framework must be solidly founded on regulation and that it must pay specific attention to the protection of workers. Workers are in a subordinate position in relation to their employers, and in the EU's eagerness to win the AI race, their rights may be overlooked. (16 p.)*

#### EUROPEAN POLICY CENTRE

##### The divided continent: understanding Europe's social landscape in 2020 and beyond

by Sophia Gaston [@sophgaston](#)

*This report sets out the findings of a major survey conducted across 13 EU member states, which were selected to provide a representative snapshot of the bloc as a whole. The survey focuses on social and cultural issues, as well as politics, leadership and economic security. The data is interpreted through three distinct themes: nostalgia, intergenerational conflict and democratic legitimacy. (62 p.)*

#### MIGRATION POLICY INSTITUTE

##### Seasonal worker programmes in Europe: promising practices and ongoing challenges

by Kate Hooper [@kmchooper](#) and Camille Le Coz [@CamilleLeCoz](#)

*Seasonal worker programs represent one of the few ways in which low-skilled workers can migrate legally to the EU, enabling them to work in sectors such as agriculture, hospitality, and tourism. Countries have taken different approaches to selecting seasonal workers, with some recruiting from within the EU and others soliciting workers from third countries. (20 p.)*

#### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

##### Gender equality: what is the legacy of the last EU mandate and what should we aim for in the year of the Beijing+25 jubilee?

by Agnès Hubert

*The new Parliament and Commission register the largest presence of women ever. The Commission and the ECB will for the first time be led by a woman. These are good premises. Despite its commitments, the Juncker Commission had largely ignored the gender dimension and, in general, the EU movement towards gender equality has been a slow one. Against this backdrop it is arguable whether European gender equality policy can be depicted as a success story. A crucial step forward would be the embedding of*

gender policies into European policies. (14 p.)

### EUROPEAN POLICY CENTRE

#### What role for health in the new Commission?

by Simona Guagliardo [@s\\_guagliardo](#)

*This brief argues that von der Leyen's agenda for a "Union that strives for more" offers a unique opportunity to build a strong case for placing health and well-being at the centre of her policy triad: economic growth fuelled by technological innovation and environmental protection. The EU and its member states must recognise the centrality of people's health and well-being vis-à-vis economic growth; ensure that health is a constant factor in all policymaking; and deliver on their promises of social fairness, equality and inclusion. (4 p.)*

### EUROPEAN PARLIAMENT THINK THANK

#### Addressing health inequalities in the European Union

by Nicole Scholz

*Tackling socially determined inequalities in health, both between and within EU member states, is still a major challenge. This analysis describes the main concepts and gives examples for health inequalities across the EU. It presents an overview of the work accomplished at international and EU levels. It shows, in particular, how the EU institutions, bodies and agencies have contributed to reducing health inequalities, notwithstanding that member states have the main responsibility for health policy. The analysis then goes on to depict stakeholder views, before closing with an outlook on avenues for further action. (44 p.)*

## ENVIRONMENTAL ISSUES

### NOTRE EUROPE-JACQUES DELORS INSTITUTE

#### Faire du pacte vert un succès européen

by Thomas Pellerin-Carlin [@ThPellerin](#) and Jean-Arnold Vinois

*After the achievement of peace, the Single Market and the euro, the European Green Deal can become the new main goal of the EU. Its success would strengthen the relevance and legitimacy of the EU and allow it to convince its citizens, especially the younger generations, of the crucial role that Europe has in meeting the challenges of the 21st century. If the EU wants to make the Green Deal a success, it needs a coalition, a credible narrative as well as flagship projects that will facilitate the process of making the important strategic decisions to come. (FR - 5 p.)*

### COLLEGE OF EUROPE

#### What the 'European Green Deal' means for the EU's external action

by Mario Giuseppe Varrenti

*The European Green Deal has significant global ramifications and therefore an important impact on the EU's external action, involving its diplomatic, cooperation and trade instruments. Bold action is not only needed internally to decarbonise and dematerialise our economies but also externally to support the EU's international partners in their efforts to tackle the climate emergency. In this context, technological and financial support will not be enough because climate change is a political problem. The EU should be ready to challenge the entrenched elites, at home and in partner countries, that benefit from the status quo and resist change. (5 p.)*



### BRUEGEL

#### [How good is the European Commission's Just Transition Fund proposal?](#)

by Aliénor Cameron, Grégory Claeys [@gregclaeys](#),  
Catarina Midões [@CatarinaMidoes](#) et al.

*In January, the Commission published its proposal for a just transition mechanism, intended to provide support to territories facing serious socioeconomic challenges related to the transition towards climate neutrality. This brief provides an overview and a critical assessment of the first pillar of this mechanism, the Just Transition Fund. (11 p.)*

### ECOLOGIC INSTITUTE

#### [Climate laws in Europe. Good practices in net-zero management](#)

by Matthias Duwe [@Matthias\\_Duwe](#) and Nick Evans

*No two climate laws are the same, but an analysis of nine existing laws in Europe finds that most draw on a set of common design elements to streamline action, align policy goals, establish expert and public review mechanisms and monitor progress towards national climate goals. The assessment of the existing national legislation highlights good practices and also identifies several improvements to European climate governance that could be made via the pending EU climate law. (56 p.)*

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

#### [Let's not burn our future](#)

by Mary Robinson

*Climate has been a vocal and key issue throughout 2019, namely thanks to grassroots movements such as Fridays for future. This study focuses on the different and necessary tracks for action (at the UN, national and personal levels) but also advocates an essential change in political mindsets. However, global solutions can only flourish if there is real solidarity amongst nations. This is about a different vision of society but also a different future – one that must include a liveable planet for all and that leaves no one behind. (9 p.)*

### GENERAL AFFAIRS

#### CENTRE FOR EUROPEAN POLICY STUDIES

#### [Towards a new MFF: new priorities and their impact on Italy](#)

by Giovanni Barci [@GiovanniBarci](#), Daniel Gros [@DanielGrosCEPS](#) and Jorge Núñez Ferrer

*This paper analyses the outlook for regional funding in Italy under the next Multiannual Financial Framework of the EU. The starting point is the Berlin formula, developed from a blend of national and regional indicators. The modifications to the Berlin formula proposed by the Commission would accentuate the importance of the national component. (33 p.)*

#### NOTRE EUROPE - JACQUES DELORS INSTITUTE

#### [Bientôt la fin pour les négociations sur le CFP?](#)

by Eulalia Rubio [@eulaliarubio](#)

*This publication analyses the special summit on the EU budget on February 20, concerning the negotiations on the next EU MFF. With the celebration of this summit, it is interesting to recall the challenges of these negotiations, by analyzing some of the most controversial issues, and by talking about what could happen when the Parliament comes into play. (FR - 6 p.)*

### JUSTICE AND HOME AFFAIRS

#### OPEN SOCIETY FOUNDATIONS

#### [Civil society organizations and general data protection regulation compliance](#)

by Vera Franz [@vfranz73](#), Ben Hayes [@drbenhayes](#) and Lucy Hannah

*This report looks specifically at the ways that the world's most comprehensive data privacy law impacts nongovernmental organizations. It examines what these kind of organizations have done to comply with the law. It also presents research showing ways that governments, businesses, and some powerful individuals have tried - so far*

unsuccessfully - to use the law to prevent these organizations from pursuing public interest research and reporting. The report provides a best practices guide that can be used to ensure compliance and limit risk. (82 p.)

### ELINKEINOELÄMÄN TUTKIMUSLAITOS (RESEARCH INSTITUTE OF THE FINNISH ECONOMY)

#### Short-term impacts of the GDPR on firm performance

by Heli Koski and Nelli Valmari

This paper uses extensive firm-level data on European and US companies from 2014–2018 to explore the short-term impacts of the general data protection regulation (GDPR) on European companies' financial performance. (23 p.)

### HERTIE SCHOOL/JACQUES DELORS CENTRE

#### Data sharing: a European challenge? Why the EU should make data sharing a priority

by Paul-Jasper Dittrich  @paul2jasper

Data sharing in the EU has a lot of untapped value potential both for individuals and for the economy at large. New rules and institutions that can enable data sharing in a trusted manner and give citizens more control over when and how they share their private data need to be built at the European level. The question is how? The EU should work towards a stronger culture of data sharing and help build the necessary infrastructure with a focus on two areas: building infrastructure for data sharing and access for companies, and extending the right to portability of personal data (art. 20 GDPR). (6 p.)

### CENTRE FOR EUROPEAN POLICY STUDIES

#### Access to electronic data for criminal investigations purposes in the EU

by Sergio Carrera and Marco Stefan

This paper comparatively examines the constitutional, legal and administrative

frameworks on access to and use of digital information in cross-border criminal justice cooperation in a selection of EU member states. It presents key challenges in the application of the EU mutual recognition and mutual legal assistance instruments, as well as the existence of 'promising practices' across the EU and in transatlantic relations. The paper also assesses a set of legal and practical questions raised by the ongoing policy and normative debate on the so-called "e-evidence" package. (73 p.)

### HERTIE SCHOOL/JACQUES DELORS CENTRE

#### Big data, 5G and AI. How Europol could help von der Leyen achieve her goals

by Franca König

Commission President Ursula von der Leyen has pledged to make Europe 'fit for the digital age', including in the areas of big data, 5G and artificial intelligence. On March 9, her first 100 days in office were over and measured against her agenda for the legislative period 2019–2024. While the course has been set for an innovative and competitive EU as regards digitalisation and cyber, the Commission's approach has so far lacked a security perspective. This paper explains why the inclusion of a security dimension is crucial and how Europol, the EU's agency for police cooperation, could help von der Leyen to this end. (14 p.)

### EUROPEAN PARLIAMENT THINK THANK

#### European arrest warrant: framework for analysis and preliminary findings on its implementation

by Wouter van Ballegooij and Ivana Kiendl Krišto

The European arrest warrant has led to simplified and faster surrender procedures for suspects and sentenced persons. However, trust in the system needs to be enhanced through proper implementation and further harmonisation of substantive and procedural criminal law. (36 p.)

### EUROPEAN PARLIAMENT THINK THANK

#### Dublin regulation on international protection applications: European implementation assessment

by Amandine Scherrer

*The study unveils the weaknesses in the application of the Dublin regulation, which aim at determining which member state is responsible for examining an asylum application. It shows that the initial aim of the regulation (i.e., a swift and fair access to asylum procedure in the EU) has not been achieved and that the rights of asylum seekers are not fully guaranteed throughout the procedures entailed by the regulation. (120 p.)*

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

#### Desecuritise migration to liberalise it

by Giacomo Orsini

*Since the arrival and residence of selected groups of migrants started being treated as a major security issue, complex management systems have been put in place to curb and control their mobility into Europe. New sets of policies operate to deter unwanted people from migrating; detect those crossing the border unauthorised; detain those already in the territory without documentation; and deport them back to their countries of origin. The article questions the efficiency of such measures and show how they eventually serve to increase societal anxieties towards migration. (13 p.)*

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

#### Time to govern migration together. An opportunity for Europe and Africa

by Hedwig Giusto (ed.)

*The publication advocates a few concrete policies aimed at: increasing and strengthening orderly regular migration routes; better framing relations with both African countries and African regional organisations in the field of migration management as well as development; and converging fair and non-discriminatory*

*standards and procedures in EU labour markets which put people centre stage. The goal is to formulate more concrete policy proposals for Europe in its dealing with the continuous movements of people across countries and continents, and above all between Africa and Europe. (36 p.)*

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)/FOUNDATION MAX VAN DER STOEL

#### Migration: African perspectives

by Anne van der Meer

*Irregular migrants from African countries often take the same routes to travel into the EU. As a response, the EU started to focus on tackling the root causes of irregular migration. Are the EU responses effective and sufficient, and if not, what can be done to improve EU migration policies? The study considers also the African perspectives, as stakeholders in the countries in question know what is happening on the ground and what policies are necessary. To this end, two African countries, Ghana and Tunisia are analysed and many experts in the EU have been interviewed to put special emphasis on the experience of diaspora organisations and their leaders. (32 p.)*

### KONRAD-ADENAUER-STIFTUNG

#### Deep fake: Gefahren, Herausforderungen und Lösungswege

by Norbert Lossau

*Not only text messages and photos can be faked. With the help of artificial intelligence, videos can also be manipulated in such a way that truth and deception can no longer be easily distinguished. This has far-reaching consequences for society and politics. Technical and legislative measures are necessary to counteract this negative development. (DE - 9 p.)*



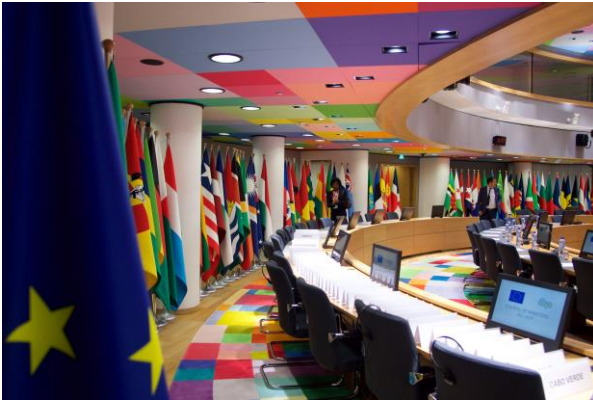
### TRANSPORT / TELECOMMUNICATIONS / ENERGY

DEUTSCHES INSTITUT FÜR  
WIRTSCHAFTSFORSCHUNG (GERMAN  
INSTITUTE FOR ECONOMIC RESEARCH)

Coase and cap-and-trade: evidence on the  
independence property from the European  
electricity sector

by Aleksandar Zaklan

*This paper provides an empirical test of the Coase theorem. It analyses whether emissions are independent from allowance allocations in the electricity sector as regulated under the EU's emissions trading system. Exogenous variation in levels of free allocation for power producing installations enables a difference-in-differences strategy. It finds that the change in allocations generally does not affect installations' emissions. The analysis suggests that policy makers may use free allocation in the political bargaining process without compromising cost-effectiveness of the cap-and-trade program. (28 p.)*



### FOREIGN AND SECURITY POLICY / DEFENCE

EGMONT - ROYAL INSTITUTE FOR  
INTERNATIONAL RELATIONS

#### Strategic choices for the 2020s

by Sven Biscop

*These past few years, the EU has taken various decisions which amount to a careful repositioning in international politics. Yet this nascent strategy is not equally shared by all EU member states or even by all EU institutions, nor has it yet been incorporated into all relevant strands of EU policy. If the implications are not fully thought through and the repositioning stops here, the EU as well as the member states risk ending up in a permanently ambivalent position. This policy brief asks whether 2020 will see the EU and the member states muster the courage to fully implement the choices that they have already started to make. (6 p.)*

### COLLEGE OF EUROPE

#### The geopolitical Commission: learning the 'language of power'?

by Sieglinde Gstöhl

*The Commission under President Ursula von der Leyen has branded itself as a 'geopolitical Commission'. Does this imply a geopolitical turn in the external action of the EU? According to HR Josep Borrell, the EU needs to learn the 'language of power' so as to translate its resources into geopolitical impact. Geopolitical EU external action implies a more integrated external action. It also means reinforcing the EU's resilience against external pressure, while not*

*neglecting 'geopolitical cooperation' in the face of geopolitical competition. The geopolitical Commission will have to find a 'European way' to deal with great power challenges in line with the EU's capabilities and values. (5 p.)*

### HERTIE SCHOOL/JACQUES DELORS CENTRE

#### Qualified majority voting in EU foreign policy: mapping preferences

by Nicole Koenig

*This brief maps member state preferences on the extension of qualified majority voting. The overview is based on a confidential expert survey with diplomatic sources from the member states conducted in late 2019. The survey led to a fourfold classification and summarises the proposal of the Juncker Commission before providing an overview of member state preferences. It concludes with a discussion of alternatives and future paths. (6 p.)*

### KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)

#### Egy hatékonyabb európai külpolitika felé? – A minősített többségi szavazásról és az Európai Biztonsági Tanácsról szóló javaslatok értékelése

by Molnár Tamás Levente, Csiki Varga Tamás and Fejérdy Gergely

*Discourse about the effectiveness of EU foreign policy has intensified in the last few years. Supporters of a more decisive European foreign policy call for a reform of the existing EU foreign policy decision-making processes and the creation of new institutions, for example changing the general rule of unanimity in CFSP to qualified majority voting, and establishing a European Security Council. The aim of this analysis is to interpret and evaluate these two proposals, while examining the legal framework provided by the existing treaties and presenting the divergent positions of member states. (HU - 12 p.)*

### GLOBSEC POLICY INSTITUTE

#### Towards a new level of European defence competence

by Knud Bartels, Wolf-Dieter Langheld, Pierre Vimont et al.

*This report highlights the central findings and recommendations of the European Security Initiative (GESI). GESI analyses the current state of development of European defence capabilities and puts forward a strategic vision of European defence in light of this context. In the authors' opinion, the concept of European defence cannot be confined solely to the EU. The European security sphere encompasses all European countries, EU and non-EU member states alike, and it is tightly knitted with transatlantic security. (32 p.)*

### STIFTUNG WISSENSCHAFT UND POLITIK (GERMAN INSTITUTE FOR INTERNATIONAL AND SECURITY AFFAIRS)

#### Auf dem Weg zu mehr Resilienz. Die baltischen Staaten zwischen Verwundbarkeit und Bündnissolidarität

by Kai-Olaf Lang

*As a result of the conflict between Russia and Ukraine since 2014, the vulnerability of the Baltic states to destabilization has become an important issue in the transatlantic and European structures. Numerous other topics came into focus, such as the role of the Russian and Russian-speaking minorities, energy security and economic interdependencies, disinformation and the digital sphere. The three countries have noticeably improved their resilience to destabilization since the mid-2010s, through their own efforts and the support of their partners in the EU and NATO. However, there are still open flanks. This applies to both military security and fields of soft security. (DE - 45 p.)*

### RAHVUSVAHELINE KAITSEUURINGUTE KESKUS (INTERNATIONAL CENTRE FOR DEFENCE AND SECURITY)

#### Capability and resolve: deterrence, security and stability in the Baltic region

by Heinrich Brauss, Kalev Stoicescu and Tony Lawrence

*In response to Russia's aggression against Ukraine in 2014, NATO has revitalised its core business of deterrence and defence and adapted it to today's political and geostrategic circumstances. In the Baltic region, the most visible expression of this effort has been the deployment of the enhanced forward presence battlegroups in Poland and the three Baltic states. These are, in turn, backed up by a readiness and reinforcement strategy, which NATO has also strengthened through the adoption of a number of measures agreed by the Allies. (29 p.)*

### EUROPEAN PARLIAMENT THINK TANK

#### Religion and the EU's external policies: Increasing engagement

by Philippe Perchoc, Naja Bentzen [@NajaBentzen](#), Enrico d'Ambrogio et al.

*Religion has been emerging as a new dimension in the EU's external policies. This paper provides an overview of the principles, institutional set-up and policies underpinning the EU's approach to religious issues in third countries. Nine case studies meanwhile serve to illustrate the important role played by religion in the foreign policies of a number of different countries worldwide. (44 p.)*

## TRADE

### COLLEGE OF EUROPE

#### A stronger Europe in the world: major challenges for EU trade policy

by Sabine Weyand [@WeyandSabine](#)

*This paper sets out the challenges posed by the rise of populism and the shift towards more power-based relations and protectionism, arguing that trade is increasingly seen as a proxy through which the battle for political supremacy is fought. The trade priorities of the new Commission*



*are reforming the WTO for the benefit of a predictable, rules-based multilateral system; managing the bilateral relations with major powers including the US, China and UK; contributing as a 'geopolitical Commission' to other policy fields and in particular the European Green Deal; and levelling the playing field by promoting EU standards. (19 p.)*

### BRUEGEL

#### [From globalization to deglobalization: zooming into trade](#)

by Alicia García Herrero [@Aligarciaherrer](#)

*After decades of increasing globalization both in trade, capital flows but even people to people movements, it seems the trend has turned towards deglobalization. This article shows some evidence of the decrease in merchandise, capital and, to a lesser extent people to people flows. Zooming into trade, the article offers an account of the importance of the strategic competition between the US and China to foster the deglobalization trend further. The demise of the WTO could be one of the most relevant turning points towards deglobalization, especially as far as trade is concerned. This should bring downward pressure to growth globally. (10 p.)*

## AFRICA

### INTERNATIONAL CRISIS GROUP

#### [Eight priorities for the African Union in 2020](#) [Huit priorités de l'Union africaine en 2020](#)

*African leaders will meet in Addis Ababa, Ethiopia for the annual African Union (AU) summit. This year's theme is "Silencing the Guns", reviving an aspiration set out by African leaders in 2013 to end war and prevent genocide on the continent by 2020. Though the aim of resolving all conflicts in seven years set the bar high, the AU has scored some successes. (EN - 16 p. / FR -20 p.)*

### STIFTUNG WISSENSCHAFT UND POLITIK (GERMAN INSTITUTE FOR INTERNATIONAL AND SECURITY AFFAIRS)

#### [Die Afrikanische Freihandelszone](#) [Perspektiven für Afrika und die europäische Politik](#)

by Evita Schmieg

*The African Continental Free Trade Area (AfCFTA) agreement entered into force in May 2019 and should create the basis for a comprehensive African market; first of all, it starts complicated, probably with long-lasting negotiations. The end result will not be complete free trade in Africa, but a tariff reduction that could stimulate trade and production and strengthen regional value chains. However, considerations to adjust the EU's trade policy towards Africa - and that this could be an issue for the German Presidency - are premature. Nevertheless, Germany and the EU should continue to support the establishment of the AfCFTA, because it is an important political process with long-term economic potential for Africa. (DE - 8 p.)*

### DEUTSCHE INSTITUT FÜR ENTWICKLUNGSPOLITIK (DIE)

#### [African jobs in the digital era. Export options with a focus on online labour](#)

by Elvis Melia

*The global digital transformation is pushing more and more work into the cloud and bringing fast, reliable internet connections to all areas of the world. Meanwhile, in Africa, demographic change is pushing more and more young people into cities, where jobs are scarce, even for university graduates. Against this backdrop, this study asks whether IT enabled services exports may become a vehicle for African catch-up development in the 21st century, the way light manufacturing exports were for 20th-century East Asia. (90 p.)*

### INSTITUTO ESPAÑOL DE ESTUDIOS ESTRATÉGICOS

#### Cambio climático e inestabilidad en el Shael

by Carlos Javier Frías Sánchez

*The Sahel is the scenario of conflicts stretching from one end of that strip to the other. It is common to label these conflicts as «ethnic» or «tribal» conflicts, or simply link them to the global rise of Islamic terrorism. It is important to note that these ethnic and religious rivalries are largely born out of historical competition for scarce economic resources. On this initial reason, the course of history has added new factors that boost this basic conflict. (ES - 26 p.)*

### NEDERLANDS INSTITUUT VOOR INTERNATIONALE BETREKKINGEN - CLINGENDAEL (NETHERLANDS INSTITUTE OF INTERNATIONAL RELATIONS)

#### Consolidating Sudan's transition. A question of legitimacy

by Jonathan Tossell

*The 2019 Sudanese uprising has led to a transitional government with a civil and military component. An eventual transition to full civilian rule will depend on the civil component's ability to establish its legitimacy and carry out much-needed reforms. In 2020, European policy makers should invest and support the more liberal sections of the Sudanese economy, and provide opportunities for the civil component to secure tangible, quick project results. This policy brief explores ways in which European policy makers could support the transitional government and other actors in Sudan in order to support a transition towards a legitimate and stable longer term governance arrangement. (16 p.)*

### ASIA-OCEANIA

### INSTITUT FRANÇAIS DES RELATIONS INTERNATIONALES

#### Japan's trade policy in the midst of uncertainty

by Yuka Fukunaga

*The multilateral trading system under the WTO has been of the utmost importance for Japan's trade policy. Japan strongly supports the WTO's rule-based dispute settlement mechanism, and frequently uses it. In recent years, the adoption and implementation of regional and mega-regional trade agreements have become critical in Japan's trade policy. The report refers to Japan's approach to regional trade agreements regarding the withdrawal of the US from the Trans-Pacific Partnership agreement. It lays down the reasons why the agreement is not satisfactory for the Japanese automotive industry. (31 p.)*

### KONRAD-ADENAUER-STIFTUNG

#### Paukenschlag auf den Philippinen - Staatspräsident kündigt Militärabkommen mit den USA

by Stefan Jost

*The US' refusal of a visa to Senator Ronald de la Rosa initially led to a public ultimatum to the US to reverse the decision. At the end of this ultimatum, Duterte terminated one of the three military agreements with the US expiring on August 8th. This unilateral decision by President Duterte has led to ongoing and extremely critical discussions in the Philippines. It is not about the financial and political consequences for the Philippines itself. Rather, there is fear of a weakening of the strategic position of the US in the conflictive zone of the South China Sea, in which China has for years been increasingly aggressively asserting its claim to sovereignty. (DE - 5 p.)*

### EASTERN EUROPE

#### EUROPEAN UNION INSTITUTE FOR SECURITY STUDIES

##### Devil in the detail: local versus regional approaches to peace in Donbas

by Karen Madoian

*This brief analyses the peace efforts in Ukraine and argues that it would be in the country's interest to continue decentralising and strengthening local governance structures, including in the east. It also considers how does Moscow views this idea. (8 p.)*

#### KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)

##### 2019 végének kelet-európai energiapolitikai fejleményei

by Barabás Tibor János

*This analysis summarises the 2019 autumn/winter Ukrainian and regional energy policy developments. As a result of a law amendment by the Kiev Parliament and a government decision, Ukraine purchases Russian electricity. This makes the energy policy of the country more uncertain and unpredictable, but at the same time the effects of the Ukrainian–Russian rapprochement are considerably mitigated by the expansion of liquefied gas (LNG), the existing EU energy projects and the lack of appropriate pipeline systems. (HU - 10 p.)*

### LATIN AMERICA AND THE CARIBBEAN

#### MIGRATION POLICY INSTITUTE

##### An uneven welcome: Latin American and Caribbean responses to Venezuelan and Nicaraguan migration Bienvenidas asimétricas: Respuestas de América Latina y el Caribe a la migración venezolana y nicaragüense

by Andrew Selee [@SeleeAndrew](#) and Jessica Bolter [@jessicabolter](#)

*Large-scale displacement from Venezuela and Nicaragua is reshaping the migration landscape in much of Latin America and the Caribbean. This report examines the immigration and integration policy responses of 11 countries, including pathways to legal status and measures to integrate newcomers into schools, health-care systems, and labour markets. (EN - 63 p.) (ES - 67 p.)*

#### DEUTSCHE GESELLSCHAFT FÜR AUSWÄRTIGE POLITIK (GERMAN COUNCIL ON FOREIGN RELATIONS)

##### Latein Amerika im Krisenmodus Soziale und politische Unruhen lähmen Regierungshandeln

by Detlef Nolte

*Latin America threatens to become a crisis region again. The economies of the former hope region stagnate and social conflicts unload in mass protests. The EU should develop close cooperation with the region to promote regional integration and to help protect democracy and human rights. (DE - 10 p.)*

#### INTERNATIONAL CRISIS GROUP

##### Armas por doquier: cómo frenar la amenaza de grupos violentos a Venezuela A Glut of Arms: Curbing the Threat to Venezuela from Violent Groups

*As Venezuela's turmoil deepens with no end in sight, power is seeping out of formal state institutions and pooling in the hands of various armed irregulars. These groups' threat to peace must be contained, and that imperative should feature prominently in*

future talks aimed at settling the crisis. (EN - 27 p.) (ES - 28 p.)

### MIDDLE EAST / NORTH AFRICA (MENA)

#### ISTITUTO PER GLI STUDI DI POLITICA INTERNAZIONALE (ISPI)

##### Mediterraneo allargato

by Valeria Talbot [@TalbotValeria](#) (ed.)

The enlarged Mediterranean region continues to be characterized by strong political instability, often closely related to economic instability. Since the end of 2019, the Syrian crisis has escalated. This publication analyses the recent developments and the Middle East instability with a territorial focus on the following countries: Algeria, Egypt, Iran, Iraq, Israel, Lebanon, Libya, Tunisia and Turkey. The Turkey-GNA agreement on maritime borders and its reflections in transversal dynamics of the Eastern Mediterranean is in-depth analysed. (IT – 91 p.)

#### INTERNATIONAL CRISIS GROUP

##### Easing Syrian refugees' plight in Lebanon

With an estimated Syrian refugee population of 1.5 million on top of its 4 million resident nationals, Lebanon claims the highest refugee-per-capita ratio in the world. Today, all political parties in Lebanon agree that the refugees should eventually leave, though they disagree on the conditions that would need to prevail for them to return home. (43 p.)

#### KONRAD-ADENAUER-STIFTUNG

##### Syrer, Quo Vadis? Zur Zukunft der syrischen Flüchtlinge in der Türkei

by Walter Glos and Friedrich Püttmann [@Friedrich\\_Cle](#)

To date, more than 3.6 million Syrian refugees have come to or were born in Turkey. The situation in the home country remains unacceptable and Turkey has already become a (new) home for many Syrian children. At the same time, social acceptance in Turkey towards Syrian refugees has also dropped dramatically.

Their return has become a topic of the election campaign and Turkey's planned security zone in northern Syria should enable up to 2 million of them to leave the country again soon. What caused this development? And what political positions are there to consider? (DE - 5 p.)

#### KONRAD-ADENAUER-STIFTUNG

##### Trumps Nahost-Plan – Reaktionen aus der Region. Ein erstes Stimmungsbild aus Israel, den Palästinensischen Gebieten, Jordanien und den Golf-Staaten

by Alexander Brakel, Steven Höfner, Annette Ranko et al.

In January, US President Donald Trump and Israeli Prime Minister Benjamin Netanyahu presented a plan for a solution to the Middle East conflict, which had long been announced as the “deal of the century”. This report summarizes initial reactions from the Middle East regions. (DE - 5 p.)

#### KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)

##### Algéria az elnökválasztás után – A politikai válság és az elnökválasztások értékelése

by Ágoston Csenge, Lafferton Sára and Szalai Máté

The aim of this analysis is to assess the political crisis of 2019 in Algeria and the presidential elections from the perspective of the Algerian political system. The main finding of the research is that the rise of Tebboune cannot be considered a systemic change and it does not provide stability on the middle term by itself. (HU - 11 p.)

#### EUROPEAN COUNCIL ON FOREIGN RELATIONS

##### Demonstration effects: how the Hirak protest movement is reshaping Algerian politics

by Amel Boubekour [@AmelBoubekour](#)

The Hirak protest movement has revealed flaws in Algeria's ruling system, which lacks the tools to reinvent itself or negotiate a new social contract with the people. The army has been unable to restore the “civilian president” narrative it used for two decades, while the



current president has been unable to disguise his dependence on the military leadership. The regime is trying to promote a narrative on the removal of mafias connected with the former president as a guarantee of a new era. (23 p.)

### BARCELONA CENTRE FOR INTERNATIONAL AFFAIRS

#### How Libya impacts North Africa

by Francis Ghilès and Akram Khariéf

Algeria's re-entry into the regional diplomatic and security fray, and its stance that conflicts should be resolved regionally, would appear welcome in western Libya and Tripoli. Algeria is looking to play a leading role in the Libyan political process. It is too far from the combat zone to be directly threatened but it remains very alert to the security risks a major conflagration in Tripoli might pose in Tunisia, whose stability it considers as vital for its own. (5 p.)

### ISTITUTO AFFARI INTERNAZIONALI (IAI)

#### General Haftar and the risks of authoritarian "stability" in Libya

by Mattia Giampaolo [@Mattia88261](#)

Since 2014, Haftar has been building his quasi-state in a not too subtle attempt to emerge as the undisputed leader of the country. To consolidate his authority, Haftar has sought to emulate the example of Egypt's military ruler, Abdel Fattah al-Sisi. Haftar has woven a narrative that depicts himself as the "saviour of the nation", the only bulwark against Islamist terrorism and instability. However, international actors, and particularly European member states, would do well to heed this warning and not repeat the old mistake of investing in the myth of authoritarian stability. (6 p.)

### EUROPEAN COUNCIL ON FOREIGN RELATIONS

#### A Gulf apart: how Europe can gain influence with the Gulf Cooperation Council

by Cinzia Bianco [@Cinzia\\_Bianco](#)

Gulf Arab states are at the centre of a new balance of power in the MENA. With US

dominance of the region declining amid the chaos of the past decade, members of the Gulf Cooperation Council (GCC) have expanded their international role like never before. They pursued rivalries and developed alliances across north Africa and the Levant. They used military power to try to determine the outcome of intractable conflicts in Libya and Yemen. And they reached across borders to stifle or support grassroots Islamist movements, not least the Muslim Brotherhood and Shia resistance groups. For European governments that recognise the many ways in which the MENA region is key to their interests, the situation is unsustainable. (23 p.)

### ATLANTIC COUNCIL

#### Iranian digital influence efforts: guerrilla broadcasting for the twenty-first century

by Emerson T. Brooking [@etbrooking](#) and Suzanne Kianpour [@KianpourWorld](#)

Iran has invested significant resources and accumulated vast experience in the conduct of digital influence efforts. These clandestine propaganda efforts have been used to complement Iranian foreign policy operations for the better part of a decade. Nonetheless, Iranian influence capabilities have gone largely unstudied by the US, and only came to widespread attention in August 2018 with the first public identification of an Iranian propaganda network. (32 p.)

## CHINA

### ISTITUTO AFFARI INTERNAZIONALI (IAI)

#### The Coronavirus and freedom of expression in China: not so fast

by Francesca Ghiretti [@Fraghiretti](#)

The coronavirus crisis has reignited longstanding debates on the lack of freedom of speech in China. Following the death of doctor whistle-blower Li Wenliang, whose early warnings were ignored and repressed by the authorities, many believe the outbreak could have been better contained if it were not for Chinese restrictions on freedom of expression. Such reasoning has sparked criticism of the Chinese Communist Party and triggered renewed campaigns to

*pressure authorities into granting increased freedoms in China. (5 p.)*

### INSTITUTE DE RELATIONS INTERNATIONALES ET STRATÉGIQUES

#### L'intelligence artificielle, un enjeu stratégique pour la puissance chinoise

*by Xavier Seurre*

*Research and development based on Artificial Intelligence imply several aftermaths on the international and European scene. Indeed, the exponential growth of Chinese new technologies has provoked the reticence of the US government about China and especially about specific companies (e.g Huawei and the development of 5G technology). As AI services could be increased thanks to 5G, the Chinese government foresees AI as a tool to implement the following principles: surveillance, power and growth. The article lays down the new relationship between US-China and makes remarks about the impact on industry worldwide. (FR - 23 p.)*

### FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

#### China's Soft Power in Southeast Europe

*by Plamen Tonchev* [@TonchevPlamen](#)

*China does not seem to have a regional soft-power strategy and prefers bilateral relations with SEE countries. History is a key component of China's cultural diplomacy, but modern Chinese culture is not popular in the region. Beijing seeks to influence the media sector in several ways. According to few available sources, China remains rather popular in Southeast Europe, in contrast to the increasingly acrimonious mood in other parts of the EU. China's presence is also examined in light of its complementarity to the Euroatlantic aspirations of SEE nations. (25 p.)*

### INSTITUT FÜR WELTWIRTSCHAFT KIEL (KIEL INSTITUTE FOR THE WORLD ECONOMY)

#### Does the Belt and Road initiative stimulate Chinese exports? The role of state-owned enterprises

*by Holger Görg and Haiou Mao*

*This paper evaluates firms' exporting responses to BRI and considers their heterogeneity in ownership types, product types, regional origin and trade mode. According to the study, regional heterogeneity suggests that "open through the west", i.e., boosting the development of western regions in China, did not appear to work in the short term. (18 p.)*

### CHATHAM HOUSE - THE ROYAL INSTITUTE OF INTERNATIONAL AFFAIRS

#### Expanding Sino-Maghreb relations. Morocco and Tunisia

*by Yahia H. Zoubir*

*This paper looks at China's policy within the context of its Africa and Middle East policies to better understand its approach to Morocco and Tunisia. China's influence in the Maghreb remains minimal. Its soft power push has struggled to promote advantages of strong relations with China beyond economics. Morocco and Tunisia's populations have generally scant knowledge about China's politics and culture. China has tried to address this lack of familiarity through the establishment of Confucius Institutes and other cultural activities. However, language and cultural barriers still impede the development of close relations. (30 p.)*

### DEUTSCHE INSTITUT FÜR ENTWICKLUNGSPOLITIK (DIE)

#### China's growing engagement with the UNDS as an emerging nation: changing rationales, funding preferences and future trends

*by Mao RuiPeng*

*This study helps better understand China's activities and positioning at the UN in the realm of development and humanitarian affairs by analysing its UN development system (UNDS) funding and related*

decisions in depth. It also speaks to the larger debate about China's attempts to proactively shape the international system and multilateralism. As the author notes, there are many different reasons for increasing contributions to the UNDS, from making reputational gains and appreciating the UN's multilateral assets to seeking greater influence and using the UNDS for China's Belt and Road Initiative. (52 p.)

### RUSSIA

#### BRUEGEL

##### FDI another day: Russian reliance on European investment

by Marta Domínguez-Jiménez [@MartaDomnquezJ1](#) and Niclas Poitiers

Most foreign direct investment into Russia originates in the EU: European investors own between 55 percent and 75 percent of Russian FDI stock. This points to a Russian dependence on European investment, making the EU paramount for Russian medium-term growth. Even if we consider 'phantom' FDI that transits through Europe, the EU remains the primary investor in Russia. Most phantom FDI into Russia is believed to originate from Russia itself and thus is by construction not foreign. (13 p.)

#### BARCELONA CENTRE FOR INTERNATIONAL AFFAIRS

##### Russia-Ukraine transit deal: a crisis postponed?

by Alan Riley

The last minute signing of the transit contract between Russia and Ukraine has led to a fall in European gas prices as markets reacted to news of the deal. The deal took place in the context of reforms in the Ukrainian energy sector which saw the unbundling of Naftogaz and the certification of the new transmission system operator by the Ukrainian authorities. The principal reason for the willingness of Russia to authorise Gazprom to do deal with Naftogaz was that on December 20th the US had placed effective sanctions on the Nord Stream 2 pipeline. (5 p.)

#### FREE NETWORK

##### A secade of Russian cross-domain coercion towards Ukraine: letting the data speak

by Khrystyna Holynska, Yar Batoch, Yevhen Sapolovych et al.

Russia's coercion towards Ukraine regularly makes the headlines of influential news outlets. But the question remains open – do we really understand it? We diligently collect and analyse data to make informed decisions in practically all domestic issues but is the same done for international relations? This research paper introduces a number of tools and methods that could be used to study Russia's coercion towards Ukraine beyond its most visible manifestation, looking into latent trends and relations that could reveal more. (10 p.)

#### OŚRODEK STUDIÓW WSCHODNICH (CENTRE FOR EASTERN STUDIES)

##### Defying America. Russia's policy towards Iran

by Witold Rodkiewicz

Russia's relations with Iran are almost entirely based on geopolitical considerations. The Russian elite perceives Iran as an essential, albeit difficult partner, with whom it shares a number of interests. The foundation of the Russian-Iranian strategic partnership is both countries' common interest in reducing American power and influence, both in the Middle East and globally. The partnership with Iran is also important for Russia because it helps to stabilise the geopolitical situation in the south of the post-Soviet area (the Southern Caucasus and Central Asia) and minimise the influence of Western countries in the region. (9 p.)

### UK / BREXIT

#### THE LONDON SCHOOL OF ECONOMICS AND POLITICAL SCIENCE

##### Getting Brexit started: prospects for a new EU-UK partnership into the 2020s

by Andrew Hammond and Tim Oliver [@timothyoliver](#)

The withdrawal of the UK from the EU on January 31 was a seminal moment in post-

war history. With Brexit negotiations still underway, this paper underlines that the final form of the UK's departure from the EU is not yet set in stone. Even with a withdrawal deal now ratified, there are multiple scenarios still possible: from a disorderly exit this year, through to the outside prospect of the transition being extended and a deep, comprehensive deal being concluded later in the 2020s. The stakes in play therefore remain huge and historic as both sides seek a new constructive partnership. (24 p.)

### LUISS SCHOOL OF EUROPEAN POLITICAL ECONOMY

#### A tale of four balls and one grenade

by Riccardo Perissich

Seen from the EU, Boris Johnson could look like a juggler who is busy keeping in the air four balls and one grenade. The first ball is the "global Britain". The second is the "special relations", based on the idea that the UK could give special relations with the US a new life. The third ball is the "one nation", based on Johnson's political priority to consolidate electoral gains and make the majority permanent. The fourth biggest ball is "Take back control" and relates to the forthcoming negotiations between the UK and the EU, especially on trade. The one grenade in the hands of the juggler is Ireland. The article reflects also on the huge potential impact of Brexit on the border between Ulster and the Republic of Ireland which was grossly underestimated by those who promoted the Brexit referendum. (12 p.)

### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

#### Brexit Britain 2020: Johnson triumphant, Labour in meltdown, where next?

by Roger Liddle

This study examines the political prospects for Brexit Britain in the light of the December 2019 general election result. It examines the reasons for Boris Johnson's decisive victory and Labour's devastating defeat. Boris Johnson, with his victories in former Labour seats in the industrial towns of the midlands and the north, has created a new Conservative coalition. But the politics of this

new coalition are as yet uncertain. Will they still lead in the direction of 'Global Britain'? By what means will the Conservatives seek to retain their newfound working class support? (17 p.)

### INSTITUT PRO EVROPSKOU POLITIKU EUROPEUM (EUROPEUM INSTITUTE FOR EUROPEAN POLICY)

#### EU MONITOR: Brexit, now what? Examining the future of Central and Eastern European security post-Brexit

by Danielle Piatkiewicz

End January, began the long-awaited legal withdrawal of the UK from the EU. As the UK disengages politically, Europe's existing security structure will undergo reconstruction as EU member states reevaluate their future without the UK as active members of CSDP, NATO or PESCO. As the UK seeks bilateral partnerships post-Brexit, steadfast security consumers like Central and Eastern Europe (CEE) should gauge how Brexit will affect their security region. As one of the strongest European militaries, an engaged or disengaged UK will certainly affect the security environment, but it will be up to how the EU and CEE countries react and adapt, that will impact the future security of their region once Brexit takes effect. (7 p.)

## UNITED STATES OF AMERICA

### COUNCIL ON FOREIGN RELATIONS

#### Stabilizing the US - Korea trade agenda under Trump and Moon

by Tami Overby [@tamioverby](#), Scott A. Snyder [@snydersas](#), Troy Stangorone et al.

Uncertainty in the US-South Korea economic partnership could hinder security cooperation if left unchecked. The two countries should explore collaboration in AI technologies, policy coordination in the Indo-Pacific, and economic cooperation with North Korea. (20 p.)



### INSTITUT DER DEUTSCHEN WIRTSCHAFT KÖLN (COLOGNE INSTITUTE FOR ECONOMIC RESEARCH)

#### Die US-Demokraten vor den Wahlen. Was bedeuten die Positionen der Kandidaten für die europäische Wirtschaftspolitik?

by Hubertus Bardt

*The USA is at the beginning of an election year. The elections on November 3, 2020 will have a formative influence on the transatlantic relationship and on global cooperation structures in a wide range of topics. It is not just a question of whether the current administration will be elected for another four years. A re-election of the current president is likely to further weaken multilateral approaches and make transatlantic cooperation more difficult. (DE - 14 p.)*

### NEDERLANDS INSTITUUT VOOR INTERNATIONALE BETREKKINGEN - CLINGENDAEL (NETHERLANDS INSTITUTE OF INTERNATIONAL RELATIONS)

#### Emerging technologies & competition in 4th industrial revolution

by Brigitte Dekker and Maaïke Okano-Heijmans

*Amid intensifying Sino-US competition for technological leadership and geopolitical hegemony, the US government in August 2018 announced the export control reform act tailored to so-called emerging technologies. This article posits that innovative approaches to export control are needed to deal with new challenges posed by today's emerging technologies. Lacking a broad consensus on the potential military and civilian uses of emerging technologies, these technologies are arguably "omni-use" rather than "dual-use" in character. (15 p.)*

### UNITED STATES INSTITUTE OF PEACE

#### Rethinking transnational terrorism: an integrated approach

by Martha Crenshaw

*Civil war, transnational terrorism, and foreign military intervention have been studied separately but are rarely considered in combination. The connections between and*

*among terrorism, civil war, and military intervention are complex, and the points of overlap do not fit neatly into simple causal models. Yet understanding how these issues interconnect matters to American and international security. Drawing on an extensive review of the recent literature, this report considers the extent to which civil war and military interventions by foreign powers function as drivers of and rationales for transnational terrorism. (28 p.)*

## SECTION 4 - EU MEMBER STATES



### GERMANY

DEUTSCHES INSTITUT FÜR  
ENTWICKLUNGSPOLITIK (GERMAN  
DEVELOPMENT INSTITUTE)

#### The implementation of the G7 and G20 gender equality goals in Germany

by Axel Berger, Sören Hilbrich and Gabriele Köhler  
[@gabrielekoehler](#)

*In recent years, the G7 and G20 have placed increasing emphasis on gender equality. The member states of both institutions have set out a series of objectives aimed at advancing gender equality. This report examines the degree to which these goals have been implemented in Germany. First, the gender equality goals that both institutions have set out since 2009 are presented and systematised. The report then investigates the current state of progress in Germany and describes measures that have already been undertaken to implement the goals. (45 p.)*

OŚRODEK STUDIÓW WSCHODNICH  
(CENTRE FOR EASTERN STUDIES)

#### European strategic autonomy or European pillar in NATO? Germany's stance on French initiatives

by Justyna Gotkowska [@jgotkowska](#)

*Lately France's President E. Macron again reiterated the need to strengthen European autonomy in foreign and security policy and presented yet another proposal in this area. He offered to launch a strategic dialogue on the role of the French nuclear deterrence in Europe's collective security. Although the proposal is addressed to all of France's European partners, the most*

*important response will come from Germany. Official reactions in Berlin have so far been consistent with the German approach to French defence initiatives – Germany declared it is ready for such a dialogue but remains cautious about its goals. (5 p.)*

### GREECE

NOTRE EUROPE-JACQUES DELORS  
INSTITUTE

#### L'opinion publique Grecque et l'UE

by Daniel Debomy, Xenia Kourtoglou and Anna Karadimitriou

*Greece came out, over a year ago, of the financial supervision of the EU under which she lived since 2010, at the end of a third and final bailout financial plan. However, it remains "under surveillance" and constrained by commitments that were taken from the creditors. The weight of its debt (around 180% of its GDP) remains the heaviest in the euro area, falling by a quarter, the wages and pensions have melted, and the unemployment rate remains at 20%. (FR - 8 p.)*

ΕΛΛΗΝΙΚΟ ΊΔΡΥΜΑ ΕΥΡΩΠΑΪΚΗΣ ΚΑΙ  
ΕΞΩΤΕΡΙΚΗΣ ΠΟΛΙΤΙΚΗΣ (HELLENIC  
FOUNDATION FOR EUROPEAN FOREIGN  
POLICY)

#### Education and wage inequalities in Greece: access to higher education and its effects on income

by Pery Bazoti

*This paper examines the relationship between tertiary education and economic inequality. The design and flaws of the Greek education system prevent university candidates from equal opportunities since the entrance to tertiary education institutions relies heavily on the economic background of their families. The economic crisis highlighted these inequalities mainly through the decline of the disposable household income and exacerbated the already crippled abilities of the education system due to the extensive cuts that took place during this time. (29 p.)*

### ITALY

#### FOUNDATION FOR EUROPEAN PROGRESSIVE STUDIES (FEPS)

##### Italian politics: the great escape

by Eleonora Poli [@Poli\\_Eleonora](#)

The so-called yellow-red coalition government (5 Star Movement (M5S), the Democratic Party (PD) and some other small political parties) has so far been costly for the PD. When it comes to national parliament voting intention, the PD currently scores 18% (-5%), followed by the M5S with 16% (-4%), thus lagging far behind the League (33%). To regain electoral support, the PD needs to deliver what is an anti-Salvini coalition and transform it into a coalition that functions properly. Effective economic reforms that both respect the EU parameters and benefit middle- and low-income families are of vital importance. (11 p.)

### HUNGARY

#### KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)

##### A regionális és globális értékláncok változásai a magyar külgazdasági érdekek tükrében

by Kacsirek László

Hungary's economy and exports are strongly determined by participation in big transnational companies' global value chains (GVCs). The analysis of factors shows that GVC trends will probably increase the weight of Hungary's exports to the EU. The trends offer opportunities for Hungarian small and medium-sized enterprises to increase their share in exports and their value added in value chains. Both companies and the government will have to adjust to the new trends and meet many challenges to be able to take the opportunities. (HU - 11 p.)

### NETHERLANDS

#### INTERNATIONAL CENTER FOR COUNTER-TERRORISM - THE HAGUE

##### The Dutch approach to extremist offenders

by Liesbeth van der Heide and Olivia Kearney [@OliviaJKearney](#)

This brief focuses on the Dutch approach to dealing with extremist offenders. It addresses the general evolution of the terrorism threat landscape and the corresponding Dutch national counter-terrorism response. More specifically, it addresses the legal approach to the population of terrorist offenders, the development and evolution of the prison regime, and the policies that are in place to rehabilitate and reintegrate this population. (20 p.)

### AUSTRIA

#### WIENER INSTITUT FÜR INTERNATIONALE WIRTSCHAFTSVERGLEICHE (THE VIENNA INSTITUTE FOR INTERNATIONAL ECONOMIC STUDIES)

##### Österreichs Fiskalpolitik im europäischen Kontext: Handlungsspielräume bei niedrigen Zinsen und Wirtschaftsabschwung

by Philipp Heimberger [@heimbergecon](#)

This study analyses the fiscal policy space in Austria for the coming years in a European context. Under the existing interest-growth constellation, there is considerable scope for a more expansionary fiscal policy stance in Austria, and a well-dosed expansionary fiscal policy stance would not jeopardise the stability of public finances. (DE - 28 p.)

#### ÖSTERREICHISCHE GESELLSCHAFT FÜR EUROPAPOLITIK (AUSTRIAN SOCIETY FOR EUROPEAN POLITICS)

##### EU-Forschungsförderung in Gefahr: Ein Weckruf

by Daniel Spichtinger [@danielsp](#)

If the EU wants to keep pace with developments in other regions of the world

## SECTION 4 - EU MEMBER STATES

and to be competitive, it needs adequate funding for research and innovation. Austria has benefited enormously from the EU framework programs for research funding in the past few years and should therefore support a higher overall budget in order to secure funding for the new research program "Horizon Europe". The Austrian research community should actively - also at the highest political level - work to prevent the new budget for "Horizon Europe" from "starving" in good time. (DE - 6 p.)

### POLAND

**FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION) / IT FOR CHANGE**

#### Der polnische Wähler: ein Zyniker?

by Przemysław Sadura and Sławomir Sierakowski

The Law and Justice Party (PiS) clearly won the parliamentary elections in October 2019 with 43.6 percent. However, it has not succeeded in exploiting its entire voter potential. The Polish voters are highly pragmatic. Both PiS and opposition supporters accept violations by their party if they take advantage of their policies. PiS voters are more critical of the media than opposition supporters. Three scenarios are conceivable in Poland in the coming years: a "Hungarian", a "Slovak" or - if the bourgeois-liberal opposition party PO manages to develop in the direction of the Bavarian CSU - a "Bavarian" scenario. (DE - 12 p.)

### ROMANIA

**KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)**

#### A román külpolitika dilemmái 2020-ban

by Barabás Tibor János

This analysis outlines the major changes in Romanian foreign policy after 1990, its current program, and on this basis tries to explore its foreign policies' contradictions and the possibilities for moving forward. Romanian foreign policy has a prominent goal of cooperation with the US. At the same time, Romania wants to be a leader in security policy in Southeast Europe and

would expand its role in "democracy-sharing" – which would also determine the Hungarian–Romanian bilateral relations. All these ambitions remain highly doubtful given the low efficiency of the economy, the enormous trade deficit, systemic corruption and large-scale emigration. (HU - 12 p.)

### FINLAND

**ELINKEINOELÄMÄN TUTKIMUSLAITOS (RESEARCH INSTITUTE OF THE FINNISH ECONOMY)**

#### Liikennehankkeiden työmarkkinavaikutusten arviointikehikko – ehdotus

by Antti Kauhanen, Krista Riukula [@krista\\_ri](#) and Heikki Metsäranta

The authors discuss how changes in accessibility caused by changes in the transport system affect the labor market and how to incorporate these effects to the transport appraisal framework. (FI - 7 p.)





### THE CENTER FOR CLIMATE AND SECURITY/COUNCIL ON STRATEGIC RISKS/CLINGENDAEL/IRIS/THE HAGUE CENTRE FOR STRATEGIC STUDIES

#### [The world climate and security report 2020](#)

*This 2020 report from the Expert Group of the International Military Council on Climate and Security (IMCCS) provides global and regional assessments of the security risks of a changing climate, as well as opportunities for addressing them. This report addresses a broad spectrum of the security risks of climate change, including human security risks spilling over into higher-order security risks, geopolitical impacts of climate change and impact of climate change on military and defence. (152 p.)*